

COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

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Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: Stuart Portman

Employing Office/Committee: Senate Finance Committee

Travel Expenses Paid by (List all sources): Boston Medical Center

Travel Date(s): May 18, 2018

Description/Title of Attached Forms: _____

Final Invitation - trip invitation for the half day trip

Final PSTCF - including schedule

Purpose of Amendment (describe the reason for amending original submission): These forms were
left out of the original submission

March 11, 2019
(Date)

Stuart Portman
(Signature of Traveler)



EXCEPTIONAL CARE. WITHOUT EXCEPTION.

May 11, 2018

Stuart Portman
United States Senate Committee on Finance, Majority Staff
219 Dirksen Senate Office Building
Washington, D.C. 20510

Dear Mr. Portman:

We would be honored to welcome you for a visit to Boston Medical Center on Friday, May 18, 2018, to tour our clinics and meet with clinical and administrative leaders to learn more about our innovative approaches to managing overall health care costs for our Medicaid patients, with a particular focus on our Accountable Care Organization (ACO), opioid treatment programs within the Grayken Center for Addiction, and social determinants of health.

To confirm your attendance or to obtain additional information, please contact Melissa Shannon, Vice President of Government Affairs at (617) 638-6732 or Melissa.Shannon@bmc.org. We really look forward to having you join us.

Sincerely,

A handwritten signature in black ink, appearing to read "Melissa Shannon", with a long, sweeping horizontal line extending to the right.

Melissa Shannon
Vice President, Government Affairs

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Boston Medical Center
2. Description of the trip: Stuart will visit the hospital to tour clinics and meet with clinical and administrative leaders with a focus on our Accountable Care Organization, opioid treatment, and social determinants.
3. Dates of travel: May 18, 2018
4. Place of travel: Boston, MA
5. Name and title of Senate invitees: Stuart Portman, Senate Finance Committee majority staff
6. I certify that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND -
 - ☒ I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I certify that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND -
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

This trip is sponsored solely by Boston Medical Center for the purpose of educating Stuart Portman about the hospital's initiatives to address health care costs. Boston Medical Center organized and financed the entire trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

45% of Boston Medical Center's patients are Medicaid members. Boston Medical Center has some innovative approaches to managing overall health care costs for Medicaid members. Medicaid oversight is in the jurisdiction of the Senate Finance Committee.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

None.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Boston Medical Center hosts tours and education sessions for local, state, and federal policymakers who are interested in the delivery of health care for low-income populations.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$336.41 for round trip air fare. Approximately \$60 for round trip cab rides to and from the airport.	N/A	Approximately \$15 for lunch.	N/A

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This event is planned specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

The hospital is located in Boston, MA.

19. Name and location of hotel or other lodging facility:

N/A

20. Reason(s) for selecting hotel or other lodging facility:

N/A

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The lunch provided, estimated to cost \$15, will be well below the daily per diem for meal expenditures.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Round trip coach flights.

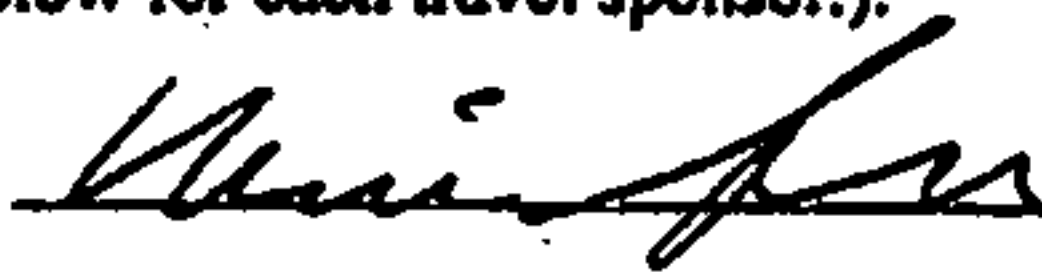
23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None.

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor:



Name and Title: Melissa Shannon, Vice President for Government Affairs

Name of Organization: Boston Medical Center

Address: 715 Albany Street, Talbot 1, Boston, MA 02118

Telephone Number: 617-638-6732

Fax Number: 617-638-7372

E-mail Address: Melissa.Shannon@bmc.org

Itinerary for Stuart Portman's visit to Boston Medical Center
May 18, 2018

Time	Location	Description
6:30 to 8:00am	Flight to Boston	American Airlines flight 2160 from National Airport to Boston.
8:00 to 10:00am	Travel to hospital	Travel via cab to Boston Medical Center with time built in for flight delays and traffic
10:00 to 10:45	Boston Medical Center (BMC)	Overview of the hospital's work with hospital CEO Kate Walsh and others. This will introduce Stuart to the programs he is going to see later in the day and give him a chance to ask our CEO any questions
10:50 to 11:05	BMC Outpatient Pharmacy	Tour of pharmacy operations. This will allow Stuart to see the volume and complexity of our pharmacy operations, as well as learn about the role that our pharmacists play in care teams, and the ways that we spend pharmacy revenue to improve care outcomes for our low income patients.
11:20 to 11:45	BMC Food Pantry	Tour the food pantry to learn about how we work to address food insecurity for our patients and ensure better health outcomes for those patients.
12:00 to 1:00	BMC Grayken Center	Meet with Michael Botticelli, Executive Director of the Grayken Center and other Grayken Center faculty to learn about BMC's addiction treatment programs.
1:10 to 1:35	BMC Primary Care	Meet with Dr. Christine Pace, Clinical Director for BMC's Accountable Care Organization, BACO, to learn about how we are improving outcomes and controlling costs for our Medicaid members.
1:40 to 2:00	BMC's Emergency Department	Tour BMC's Emergency Department to learn about BMC's innovative approaches to reducing the need for emergency care in our Medicaid population.
2pm to 6pm	Travel to airport	Travel to airport and buffer time for any delays on the tour and/or traffic.
8pm to 9:45pm	Flight to Washington DC.	American Airlines flight 2116 from Boston to National Airport. Note: this flight was less expensive than earlier alternatives.